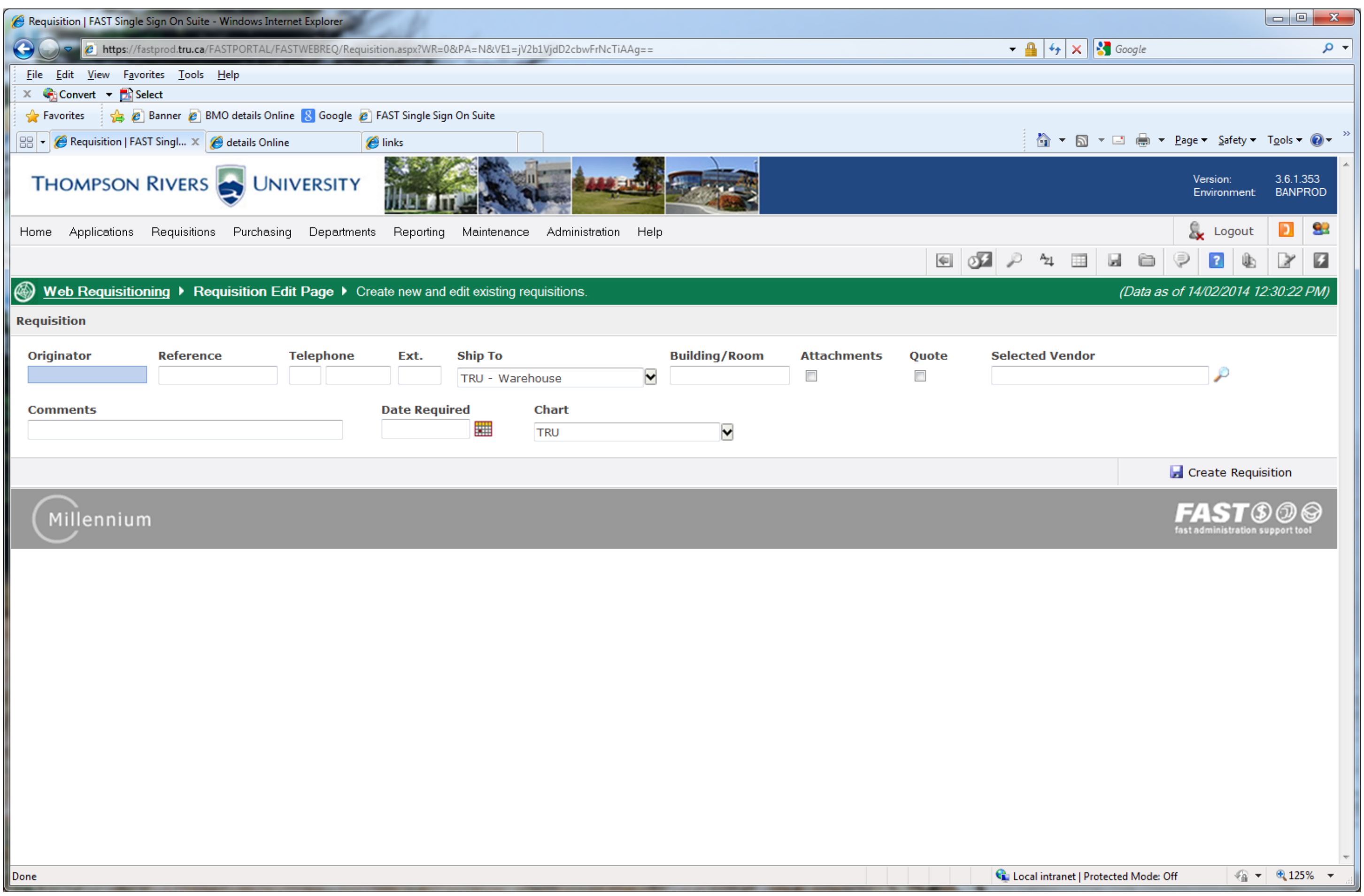
Web Requisition Process

Create a Web Requisition

Log onto FAST

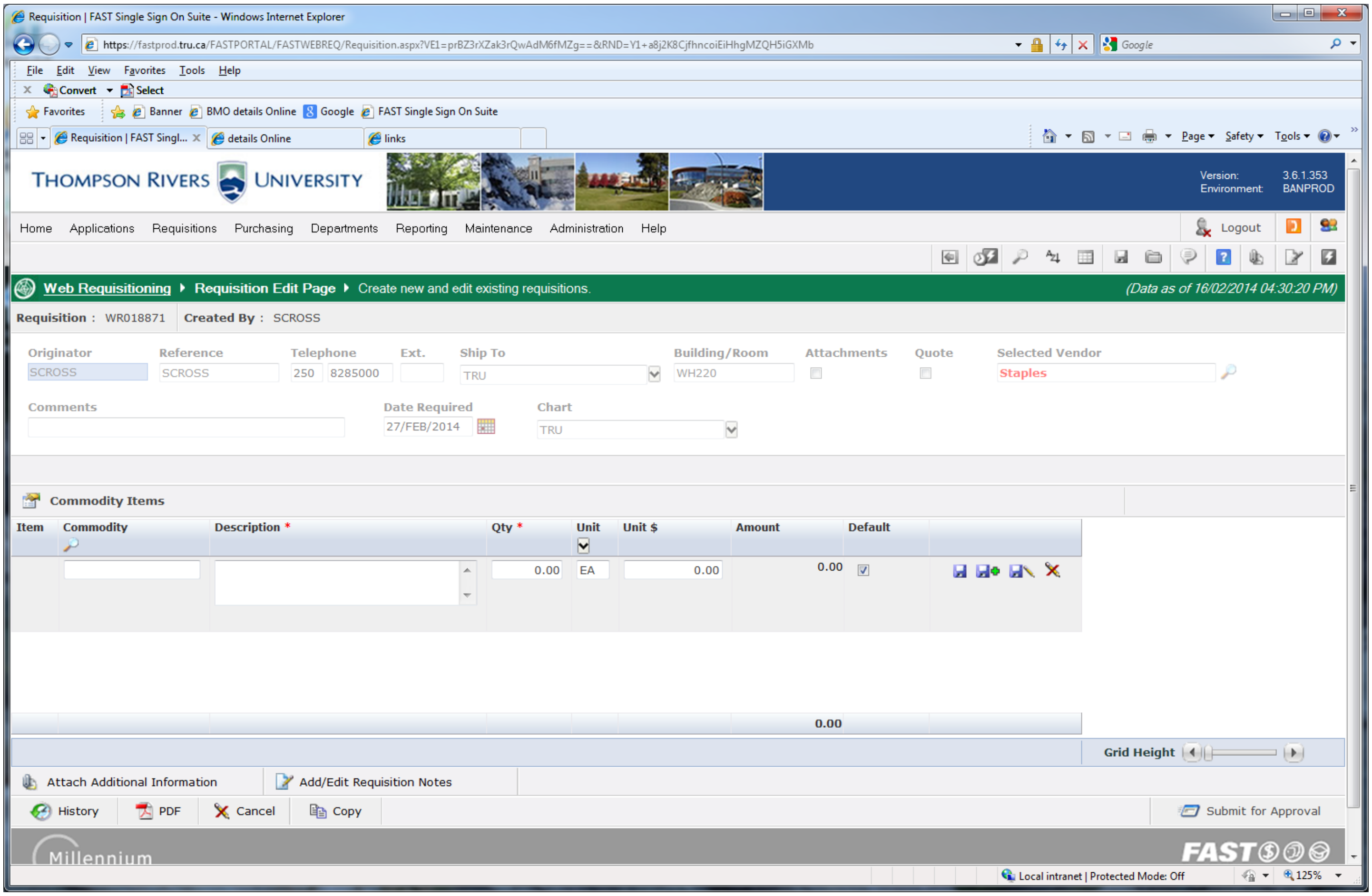
Click on **Requisitions** tab and then **New Requisitions**

ORIGINATOR: Leave blank, this auto fills with your id
REFERENCE: Leave blank, this auto fills with the last person to handle the Web Req.
TELEPHONE: Enter in area code, phone number
EXT: Enter your extension
SHIP TO: Click the drop down area to select the ship to address
BUILDING/ROOM: Enter room # where goods are to be delivered. ex. WH222
ATTACHMENTS: Click for check mark if there are attachments
QUOTE: Click for check mark if a quote is attached
SELECTED VENDOR: Click the magnifying glass to search for a vendor, (search by entering % then the first letter in upper case) if vendor is not found then manually enter the name.
COMMENTS: This field is optional. All comments written here will appear on the PO
DATE REQUIRED: Enter date the PO or item(s) is required
CHART: Leave as is
Click **Create Requisition** and WR # will be auto generated



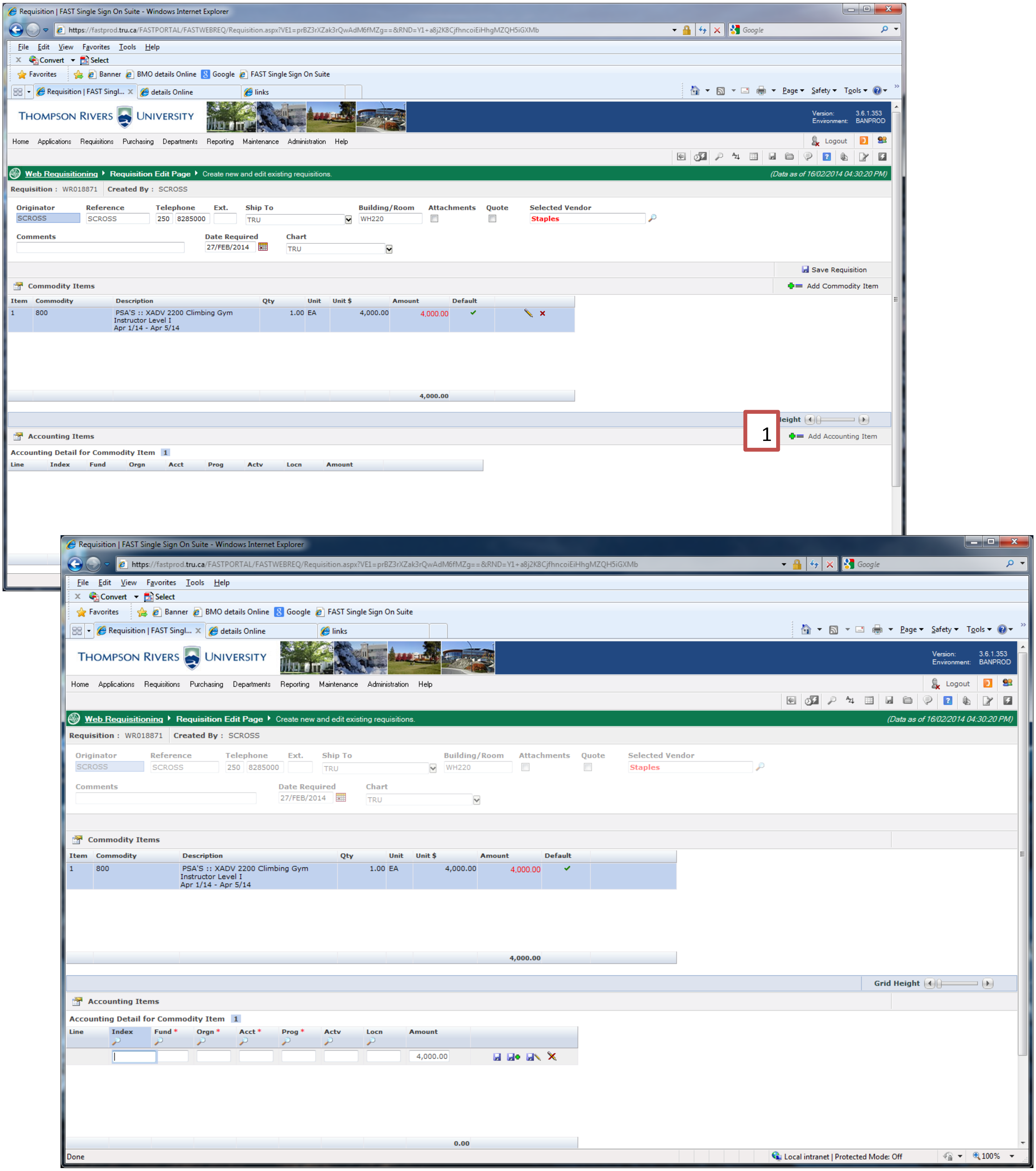
Adding Commodity Items

COMMODITY: If you know the commodity number then you can add it here, otherwise leave it blank and your completed requisition will be sent to the general Purchasing queue.
DESCRIPTION: Type a detailed description of the item or services being ordered
QTY: Enter quantity
UNIT: Make sure EA is selected
UNIT $: Enter the cost per unit and the Amount will auto populate
DEFAULT: Click to check the default box if all line items will have the same accounting code
Click the Save icon if you have only one item or if you are entering multiple items



Adding Accounting Items

Click **Add Accounting Item** 1



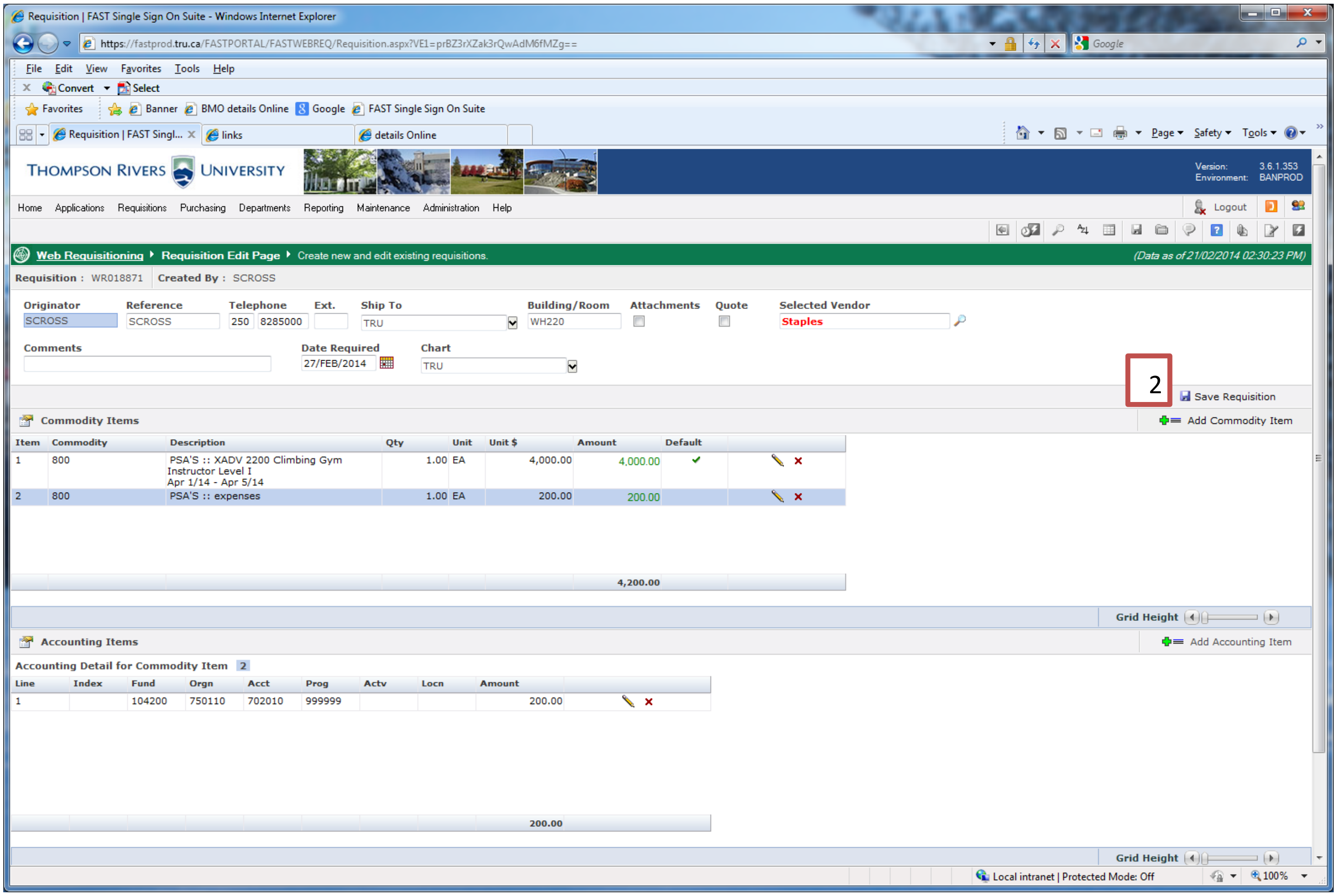
Adding Accounting Items cont'd

Enter the **FUND**, **ORGN**, **ACCT**, **PROG** and **Activity** (Optional) and click save

If multiple commodity items have been entered and each commodity item has different coding,

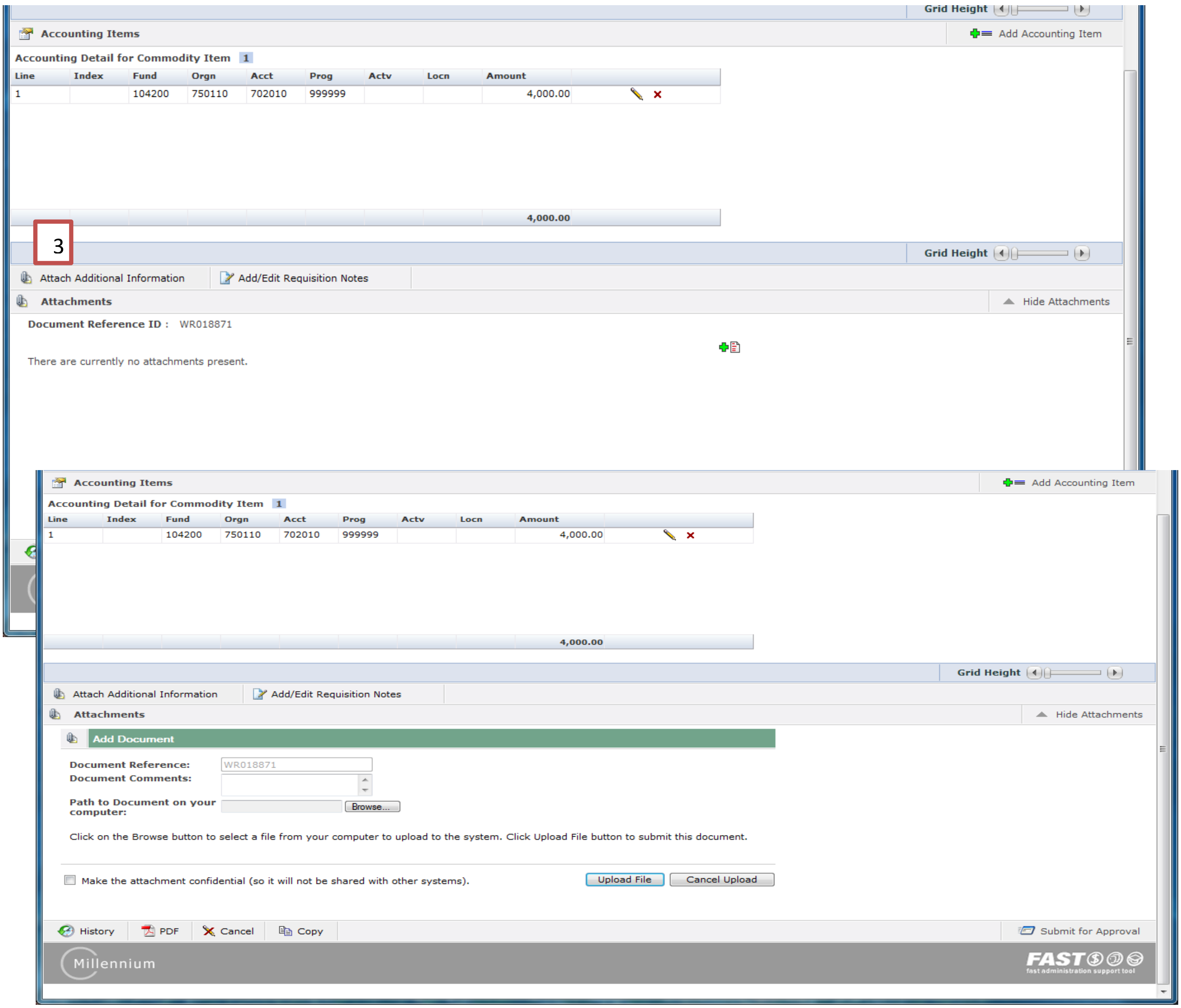
- Click on the green or red total in the amount column of the first line item to be changed, this will open up the corresponding accounting line item.
- Click on the pencil of the accounting item to edit.
- Change the coding and press save.

When all commodity items and accounting items have been entered click save requisition. 2



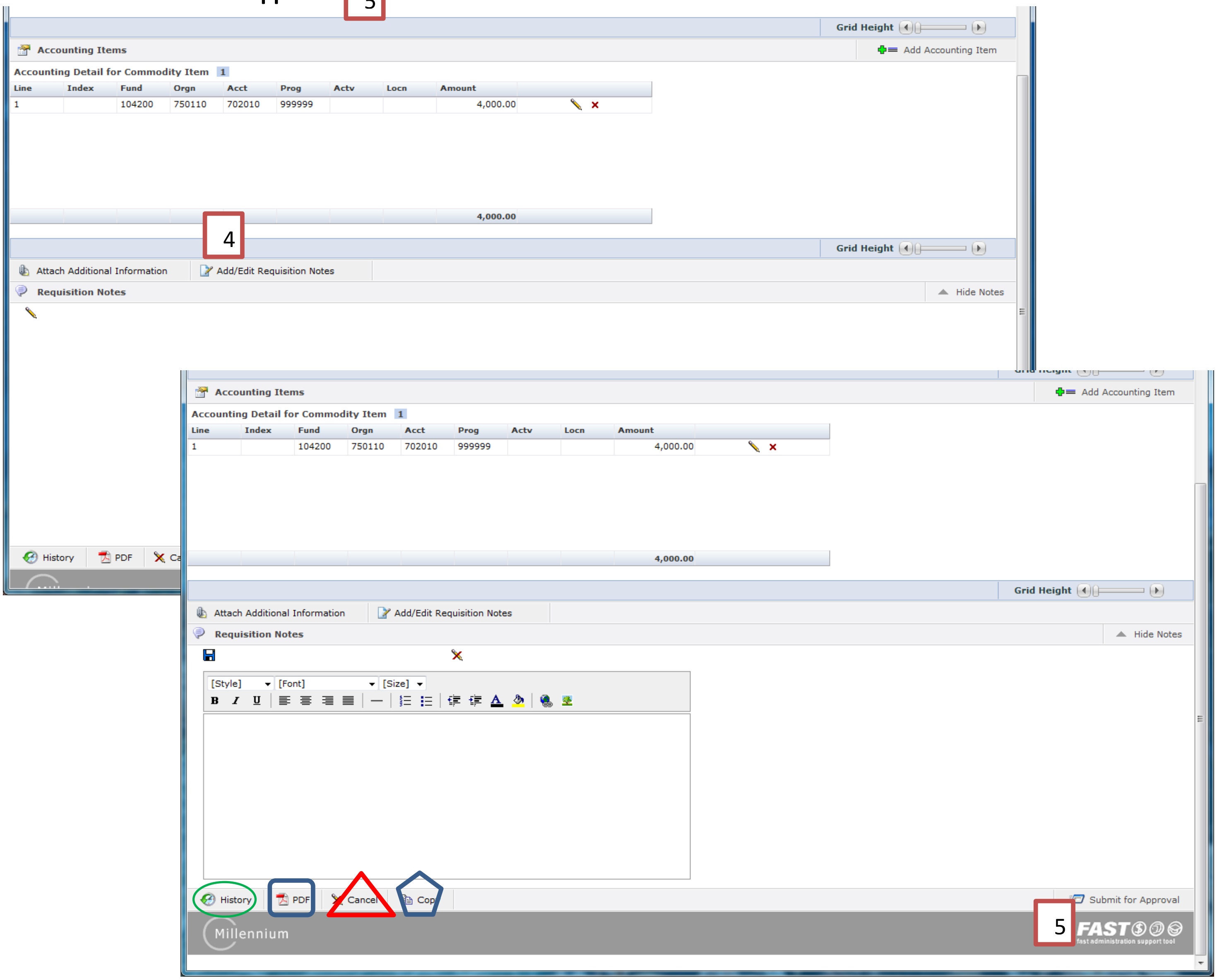
Adding Attachments

Click on **Attach Additional Information** to attach quotes, invoices, PSA's or any pertinent information 3
Click to open the **Add Document** field
Document Comments: Enter the name of the document or brief explanation
Click **Browse** to locate the document to be attached
Click **Upload File**
Do this for each document that you wish to attach
Click **Save Requisition** at the top right, when complete



Adding Requisition Notes

Click on **Add/Edit Requisition Notes** 4
Click on the pencil to open the field
Click in the field to begin typing. Anything entered here will NOT appear on the PO.
Click the save button when complete
Click **Submit for Approval** 5



History: Allows you to see where the Web Req has been

PDF: Enables you to print out the web Req for your files

Cancel: Allows you to cancel the Web Req

Copy: Allows you to copy the Web Req

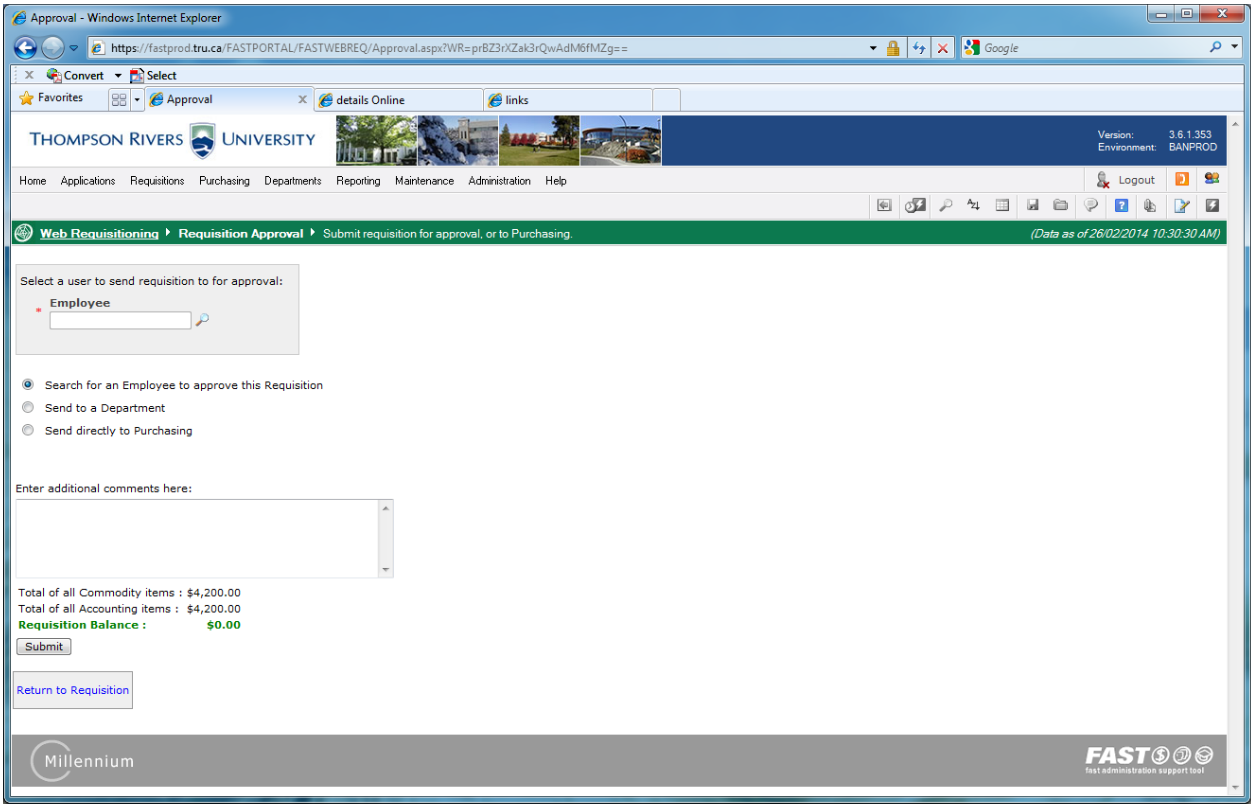
Note:

- You can cancel any requisition that you create, but you have to cancel it ***before*** you send it to Purchasing.
- Once the requisition has been submitted for approval, only a member of the Purchasing Dep. can cancel it.

Send for Budgetary Approval

Depending upon the commodity item you will need to send the Web Req for budgetary authorization (PSA's do not need to go for budgetary authorization)

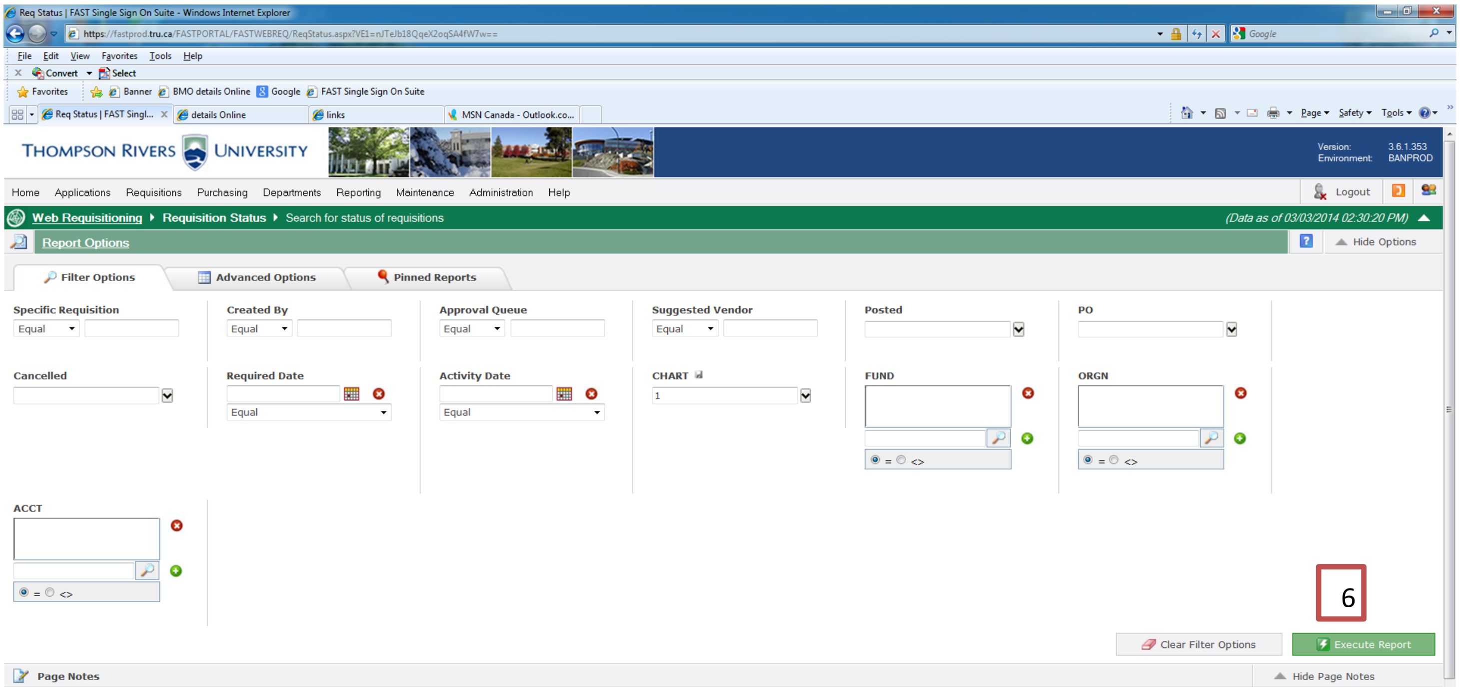
Click and enter the persons last name and click search
Double click on the correct name OR
Click **Send Directly to Purchasing** if no budgetary authorization is needed
Click in the **Enter Additional Comments Here**, if you would like to send a message to the recipient
Click **Submit**



Viewing the Status of a Requisition

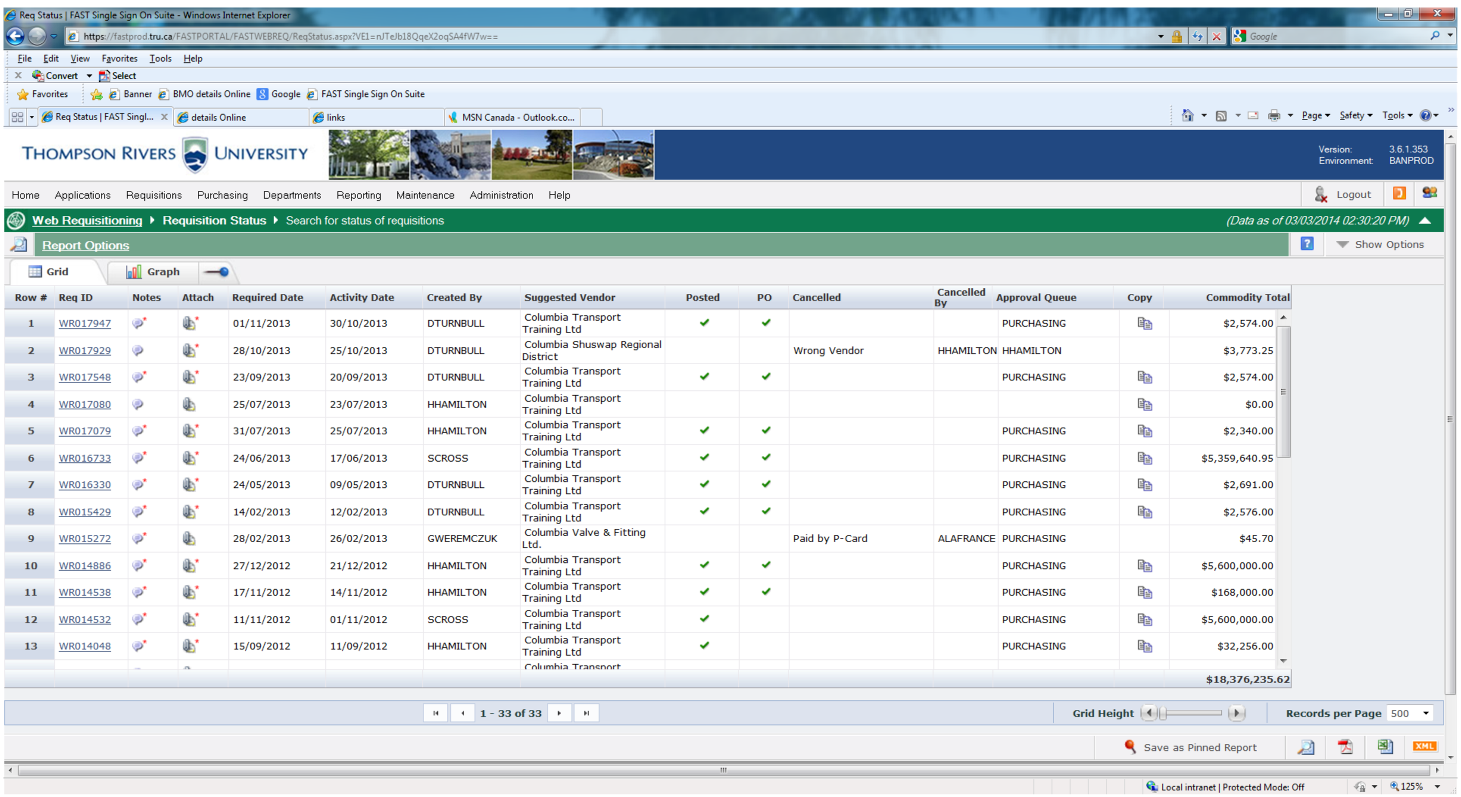
NOTE: When you are searching a requisition everything *must* be in upper case. Use only one filter option for best results.

Click **Requisitions** and **Requisition Status**, you can only view a requisition that you created
Specific Requisitions: If you know the Web Req # you are looking for
Created By: Enter your first initial and last name, no spaces (Best Option)
Suggested Vendor: Enter first part of vendor name, ex: Columbia Transport enter COLUMBIA
And press **Execute Report** 6



Viewing the Status of a Requisition cont'd

Req ID: Click on the WR# to view the Web Req
Notes: Click on the icon to view any notes for the Web Req, red * indicates notes attached
Attach: Click to view all attachments
Required Date: This is the date that was entered when the Web Req was created
Activity Date: This is the date the Web Req was sent to Purchasing
Created By: Person who created Web Req
Suggested Vendor: Vendor Name
Posted: Verifies Web Req was posted to Banner
PO: Click on the green arrow to view the PO
Cancelled: Shows cancellation reasons if the Web Req was cancelled
Cancelled By: Shows who cancelled the Web Req
Approval Queue: Shows where the Web Req is
Copy: click on the page icon to copy the Web Req
Commodity Total: Total value of the PO



Row #	Req ID	Notes	Attach	Required Date	Activity Date	Created By	Suggested Vendor	Posted	PO	Cancelled	Cancelled By	Approval Queue	Copy	Commodity Total
1	WR017947			01/11/2013	30/10/2013	DTURNBULL	Columbia Transport Training Ltd	✔	✔			PURCHASING		$2,574.00
2	WR017929			28/10/2013	25/10/2013	DTURNBULL	Columbia Shuswap Regional District			Wrong Vendor	HHAMILTON	HHAMILTON		$3,773.25
3	WR017548			23/09/2013	20/09/2013	DTURNBULL	Columbia Transport Training Ltd	✔	✔			PURCHASING		$2,574.00
4	WR017080			25/07/2013	23/07/2013	HHAMILTON	Columbia Transport Training Ltd							$0.00
5	WR017079			31/07/2013	25/07/2013	HHAMILTON	Columbia Transport Training Ltd	✔	✔			PURCHASING		$2,340.00
6	WR016733			24/06/2013	17/06/2013	SCROSS	Columbia Transport Training Ltd	✔	✔			PURCHASING		$5,359,640.95
7	WR016330			24/05/2013	09/05/2013	DTURNBULL	Columbia Transport Training Ltd	✔	✔			PURCHASING		$2,691.00
8	WR015429			14/02/2013	12/02/2013	DTURNBULL	Columbia Transport Training Ltd	✔	✔			PURCHASING		$2,576.00
9	WR015272			28/02/2013	26/02/2013	GWEREMCZUK	Columbia Valve & Fitting Ltd.			Paid by P-Card	ALAFRANCE	PURCHASING		$45.70
10	WR014886			27/12/2012	21/12/2012	HHAMILTON	Columbia Transport Training Ltd	✔	✔			PURCHASING		$5,600,000.00
11	WR014538			17/11/2012	14/11/2012	HHAMILTON	Columbia Transport Training Ltd	✔	✔			PURCHASING		$168,000.00
12	WR014532			11/11/2012	01/11/2012	SCROSS	Columbia Transport Training Ltd	✔				PURCHASING		$5,600,000.00
13	WR014048			15/09/2012	11/09/2012	HHAMILTON	Columbia Transport Training Ltd	✔				PURCHASING		$32,256.00
														$18,376,235.62